
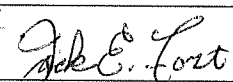
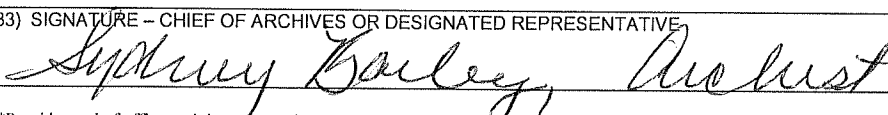


Webcat 104

## RECORDS RETENTION SCHEDULE

Submit three copies to: Department of General Services, California Records and Information Management, 707 Third St. 2<sup>nd</sup> Fl., W. Sacramento, CA 95605A CalRIM Consultant may be reached by phone at (916) 375-4404, by fax at (916) 375-4408 or by e-mail at [CalRIM@dgs.ca.gov](mailto:CalRIM@dgs.ca.gov)

(1) DEPARTMENT, BOARD OR COMMISSION <b>DEPARTMENT OF TECHNOLOGY SERVICES</b>		(2) AGENCY BILLING CODE <b>033000</b>		(3) <b>PAGE 1 OF 5 PAGES</b>	
(4) DIVISION/BRANCH/SECTION <b>ADMINISTRATIVE SERVICES BRANCH</b>		(5) ADDRESS <b>CANNERY CAMPUS, SACRAMENTO; GOLD CAMP CAMPUS, CROYDON WAREHOUSE, R.C.</b>			
CHECK THE APPROPRIATE BOX					
(6) <input type="checkbox"/> New schedule of records that have never been scheduled. [Complete boxes (9)—(12)]					
(7) <input checked="" type="checkbox"/> Revising a previous schedule. [Complete boxes (13)—(16)] (A new approval number will be assigned.)					
(8) <input type="checkbox"/> Amending some pages of a previous schedule. [Complete boxes (13)—(16)] (The original approval number will remain in effect.)					
<b>NEW SCHEDULE INFORMATION (If applicable)</b>		(9) SCHEDULE NUMBER <b>DTS-461</b>	(10) SCHEDULE DATE <b>2-27-08</b>	(11) NUMBER OF PAGES <b>5</b>	(12) CUBIC FEET (Total Schedule) <b>198</b>
<b>PREVIOUS SCHEDULE INFORMATION (If applicable)</b>		(13) SCHEDULE NUMBER <b>ADMIN 1-94</b>	(14) APPROVAL NUMBER <b>95-087</b>	(15) APPROVAL DATE(S) <b>6-19-95</b>	(16) PAGE NUMBER(S) REVISED <b>1, 3, 4 OF 6</b>
(17) MISSION/FUNCTIONAL STATEMENT <b>TO PROVIDE INFORMATION TECHNOLOGY SERVICES, SOFTWARE AND EQUIPMENT PLUS NON-INFORMATION TECHNOLOGY GOODS AND SERVICES TO THE DEPARTMENT AND OUR CUSTOMERS.</b>					
<b>PART I – AGENCY STATEMENTS</b>					
As the program manager (or person authorized to sign for the program manager) directly responsible for the records listed on this records retention schedule, I certify that all records listed are necessary and that each retention period is correct. For revisions, all items on the previous schedule are included or accounted for on the recapitulation. Vital records identified by this schedule are protected. If protection is not currently provided but plans are underway, the details of such plans are shown in Column 45, Remarks.					
(18) SIGNATURE – MANAGER RESPONSIBLE FOR THE RECORDS 		(19) TITLE <b>CHIEF</b>		(20) PHONE NUMBER <b>(916) 739-7607</b>	(21) DATE SIGNED <b>4/8/08</b>
In accordance with Government Code 14755, approval of this Records Retention Schedule by the Department of General Services is hereby requested. Retention periods shown have been established in accordance with the criteria set forth by Section 1667 of the State Administrative Manual.					
(22) SIGNATURE – RECORDS MGMT. ANALYST 		(23) CLASSIFICATION <b>STAFF SVS MANAGER I</b>	(24) NAME (PRINTED OR TYPED) <b>CHARLES RANEY</b>	(25) PHONE NUMBER <b>(916) 255-5263</b>	(26) DATE SIGNED <b>4/9/08</b>
<b>PART II – DEPARTMENT OF GENERAL SERVICES APPROVAL (Per Government Code Section 14755)</b>					
(27) SIGNATURE – CALRIM CONSULTANT 			(28) APPROVAL NUMBER <b>08-100</b>	(29) DATE SIGNED <b>4/24/08</b>	(30) EXPIRATION DATE <b>4/24/2013</b>
<b>PART III – ARCHIVAL SELECTION (Per Government Code Section 14755)</b>					
THE ATTACHED RECORDS RETENTION SCHEDULE:					
(31) <input checked="" type="checkbox"/> Contains no material subject to further review by the California State Archives					
(32) <input type="checkbox"/> Contains material subject to archival review. Items stamped "NOTIFY ARCHIVES" may not be destroyed without clearance by the California State Archives. (Per Section 1671 of the State Administrative Manual.)					
(33) SIGNATURE – CHIEF OF ARCHIVES OR DESIGNATED REPRESENTATIVE 				(34) DATE SIGNED <b>May 5, 2008</b>	



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(35) CalRIM APPROVAL NUMBER

08-100

(36)

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PAGE 2 OF 3 PAGES

ITEM #  (37)	CUBIC FEET*  (38)	CA. STATE ARCHIVES USE ONLY  (39)	TITLE AND DESCRIPTION OF RECORDS (Double space between Items)  (40)	MEDIA  (41)	VITAL  (42)	RETENTION				PRA (Exempt) & IPA  (47)	REMARKS  (48)
						OFFICE (43)	DEPT. (44)	SRC (45)	TOTAL (46)		
PROGRAM MANAGEMENT											
1	23		CONTRACTS/DELEGATIONS (includes STD 9, STD 16, STD 210, STD 213 & STD 215)	P		Active		7	Active + 7		Active until end of FY in which encumbrance is liquidated. Destroy after the required seven years or when audited by the Bureau of State Audits or the Department of General Services, whichever occurs first.
2	20		STD 213, INTERAGENCY AGREEMENTS	P		Active		7	Active + 7		Active until end of FY in which encumbrance is liquidated. Destroy after the required seven years or when audited by the Bureau of State Audits or the Department of General Services, whichever occurs first.
3	27		MRA (MASTER RENTAL AGREEMENT) FILES	P		Active		7	Active + 7		Active until end of FY in which encumbrance is liquidated. Destroy after the required seven years or when audited by the Bureau of State Audits or the Department of General Services, whichever occurs first.
4	8		REQUEST FOR QUOTE, INVITATION FOR BID	P		3		4	7		
5	66		DTS 98, SERVICE REQUEST	P		Active		7	Active + 7		Active until purchase order/contract termination date. Destroy after the required seven years or when audited by the Bureau of State Audits or the Department of General Services, whichever occurs first.
6	20		BID REQUESTS	P		Active +2		2	Active +4		Active until bids opened. Retain 2 years after end of FY; destroy after 4 years.

\*Provide total of office and departmental

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PAGE 3 OF 5 PAGES

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						OFFICE (43)	DEPT. (44)	SRC (45)	TOTAL (46)		
7	2		DRUG-FREE CERTIFICATIONS	P		Current			Current		Until superseded or canceled. Not to exceed three years.
8	2		VENDOR DATA RECORDS	P		3			3		
9	8		SOFTWARE FILES (includes STD 65, Contract/Delegation Service Order)	P		Active		7	Active + 7		Active until end of FY in which encumbrance is liquidated. Destroy after the required seven years or when audited by the Bureau of State Audits or the Department of General Services, whichever occurs first.
10	10		FACILITIES RECORDS (includes contracts, leases, invoices)	P		Active +2		5	Active +7		Until completed or expired.
11			FACILITIES RECORDS (floor plans)	P		Current			Current		Until superseded.
12			FACILITIES RECORDS (includes floor plans & contract/lease logs)	E		Active +4			Active +4		Until completed or expired.
13	3		PROPERTY & EQUIPMENT (includes STD 152, Property Survey Report & STD 158, Transfer of Location of Equipment; cell phone & hardware inventories)	P		Active +2		2	Active + 4		Active until end of FY prepared; then retain two years. Destroy after audit or 4 years, whichever occurs first.
14			PROPERTY & EQUIPMENT (includes shipping receipts & call tags)	P		1			1		
15	2		DRIVER SAFETY COORDINATOR FILES (STD 261, DMV Reports; STD 270, Report of Vehicle Accident; & other vehicle logs)	P		Active +4			Active +4	XI	Active until settlement of the claim or closure of case. Retain at least two years from end of FY in which encumbrance is liquidated. After two years destroy after audit or four years, whichever occurs first.

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						OFFICE (43)	DEPT. (44)	SRC (45)	TOTAL (46)		
16	2		ADMINISTRATIVE MANAGEMENT  PERSONNEL FOLDERS	P		Active + 1			Active + 1	XI	GC 6254(c), CC 1798.3 Witness Destruction  Active until employee leaves unit. GC 6254(c), CC 1798.3 Witness Destruction
17	1		PERSONNEL FILES (includes training records & action requests)	P		Current			Current		Current until superseded or completed.
18			PERSONNEL FILES (includes Opportunity Bulletins, Job Interviews & Questions)	E		Current			Current		Current until superseded.
19			GENERAL CORRESPONDENCE (Temporary)	P		1			1		
20			GENERAL CORRESPONDENCE (Temporary)	E		1			1		
21			REPORTS (Weekly & Daily Status)	E		Current +2			Current +2		Current until superseded.
22	3		PROJECTS	P		Active + 1			Active + 1		Active until completed; then retain one more year.
23			PROJECTS (includes logs)	E		Active +1			Active +1		Active until completed; then retain one more year.
24			FORMS FILES	E		Active +1			Active +1		Destroy one year after date form becomes obsolete.
25			RECORDS MANAGEMENT (includes e-mail & annual reports)	E		3			3		

\*Provide total of office and departmental

## RECORDS RETENTION SCHEDULE

## STATE RECORDS PROGRAM

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ITEM #  (37)	CUBIC FEET*  (38)	CA. STATE ARCHIVES USE ONLY  (39)	TITLE AND DESCRIPTION OF RECORDS (Double space between Items)  (40)	MEDIA	VITAL	RETENTION				PRA (Exempt) & IPA  (47)	REMARKS  (48)
				(41)	(42)	OFFICE (43)	DEPT. (44)	SRC (45)	TOTAL (46)		
26	1		STD 70, RECORDS INVENTORY WORKSHEET	P		Current			Current		Retain as current until next inventory, or when no longer needed for reference or analysis, whichever is later.
27			STD 73, RECORDS RETENTION SCHEDULE	P		Current			Current		Retain as current until revised. NOTE: Although revision is required every five years from date approved by DGS, RRS that are not revised remain in effect but are considered non-current.
Total c.f.	198										

SUMMARY OF CHANGES

<u>Previous RRS</u>	<u>Item #</u>	<u>Status of Item</u>
Admin 1-94	3	Is now items #17 & 18 on this schedule.
Admin 1-94	4	Is now items #19 & 20 on this schedule.
Admin 1-94	6	Is now item #9 on this schedule.
Admin 1-94	7	Is now included in item #1 on this schedule.
Admin 1-94	8	Deleted as this was reference material.
Admin 1-94	14-16	Will be placed on another schedule.
Admin 1-94	17	Is now item #3 on this schedule.
Admin 1-94	18	Is now item #13 on this schedule.
Admin 1-94	19	Is now item #5 on this schedule.
Admin 1-94	20	Is now item #15 on this schedule.
Admin 1-94	21	Is now item #16 on this schedule.
Admin 1-94	22	Will be placed on another schedule.